

Marketing Automation

How to Get Started

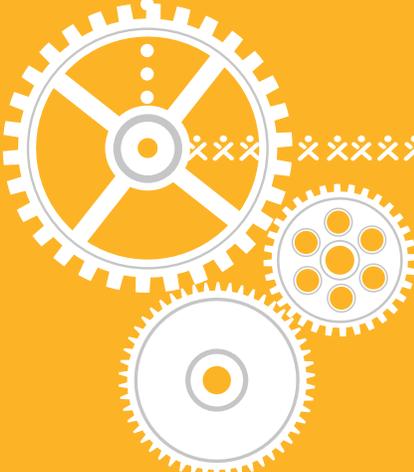
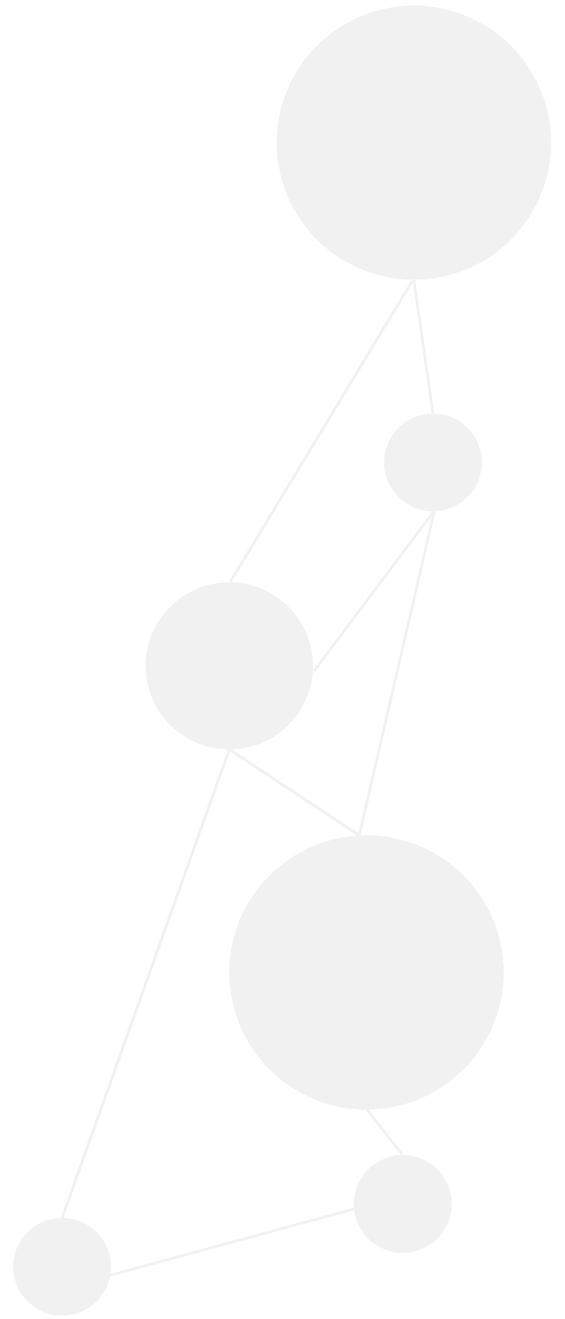


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Demand generation is an increasingly important part of the lead to money process. As it becomes more complex and requires more precise measurements to fine-tune and scale your marketing processes, you will find automation necessary. It is possible to operate manually on a very small scale, but any lead generation campaign spread over time involving a large number of prospects and multiple touch points will require a marketing automation solution. It's impossible for even a large group of humans to do this work efficiently and accurately without it.

Prerequisites

Before you select and implement a marketing automation solution, make sure you have completed or mastered the following items:

- A documented process for the entire sales cycle that includes the sales organization. This includes how leads flow back and forth between sales and marketing and how loops will be closed.
- Agreement with sales about the metrics you'll collect and use to measure success.
- Agreement with sales about what constitutes an MQL, an SQL, and an SAL.
- Agreements with sales about scoring algorithms for each of those three funnel states, including how you'll determine prospect intent based on website visits and other touch points.
- An understanding about when and how you want to nurture leads.

These items will ensure a very clear picture of your marketing automation requirements, which in turn will help you to choose the best solution.

Create a Business Justification

You may need to justify the expense of implementing a marketing automation solution before receiving management approval and funding. If so, make this a joint request and presentation from marketing and sales. That will carry far more weight than a request from a single organization.



The thrust of your argument should be around the need to improve the quantity and quality of leads to properly kick off the lead to money process. You can't do that manually or with a toolset that is not purpose-built for demand generation.

Making the numbers work all the way to the bottom line (revenue and profitability) will likely be a requirement.

Marketing automation is a critical first step in the lead to money process and is an essential tool in the drive to generate more deals, for more money, in record time.

Work with sales and your marketing automation vendor to assemble realistic ROI calculations. Be ready to defend every part of that analysis, especially if your company is struggling with revenue generation.

Emphasize the new measurement capabilities and metrics that will be available after implementing a solution.

Finally, use reputable case studies to illustrate potential improvements.

Make an Integration Plan

After vendor selection and management approval, the real fun begins.

Most companies will be replacing or supplementing existing computerized tools. (Many will likely be spreadsheets.) You may, for example, need to integrate with a CRM system or a web logfile analysis tool. You'll need to create a target system architecture. Get help from your vendors (existing and future)



as well as from knowledgeable people in your company. The latter category will likely be systems-savvy marketing folks or marketing-savvy IT folks (if that organization exists in your company).

Data migration can be a painful process depending on the quality and consistency of information in old solutions. Don't gloss over this challenge. Take the opportunity to clean up your data and to instill permanent processes to keep your databases in good order.

Inventory Your People Resources

You need to determine what kind of help you'll need and who will fill those roles. This will likely be a combination of internal and external resources. The latter category may include vendors, consultants and short-term contract expertise.

You'll need technical assistance as well as process and data experts. If you can find that combination in a single person, that's optimal. If not, assemble an appropriate team and make accountabilities clear.

Don't forget this role: a project manager. A single person needs to be accountable for planning and executing the implementation.

Inventory Your Digital Assets

These questions need positive answers before you start:

- Is your website ready?
- Has it been optimized for search engines (SEO)?
- Do you have appropriate CTAs in the correct locations?
- Is your marketing content ready? Do you have enough of it? Is the quality good?

Create an Implementation Plan

A good plan will include:

- Objectives
- Scope definition
- Timeframe and milestones, including management reviews
- Task assignments
- Task and milestone dependencies
- Accountabilities for each person
- A training plan
- A continuing support plan

There is no need to over-engineer an implementation plan. Small companies can do this informally. Large companies with many people on the implementation team may need to create formal project plans, including work breakdown structures, Gantt charts and so forth.

Get Trained

Implementations sometimes fail due to a lack of focus on training and education. Don't assume anything. It's better to err on the side of caution. Demand generation is a complex undertaking. Check with your marketing automation vendor's offerings and take advantage of onboarding and training opportunities.

Test and Refine

Implementations are never perfect. Exercise the system thoroughly to discover kinks, oddities, and other unexpected conditions that may be simple misunderstandings or bona fide system bugs. Work with your vendor(s) to understand the system; but at the same time you should be prepared to make small adaptations to your existing processes to fully utilize the new platform's capabilities.

